

# Global and China CNC Machine Tool Industry Report, 2020-2026

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## STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

## REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

## METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications.

Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

## INFORMATION SOURCES

The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

## Abstract

As a typical type of mechatronic products, CNC machine tools combine mechanical technology with CNC intelligence. The upstream mainly involves castings, sheet weldments, precision parts, functional parts, CNC systems, electrical components and other parts and components; the extensive downstream covers machinery, mold, automobile, electric equipment, railway locomotive, shipbuilding, petrochemical, electronic information technology and many other industrial industries.

Major machine tool producers include China, Germany, Japan, and the United States. Germany attaches great importance to high-tech, precise, sophisticated and practical CNC machine tools and accessories. It is highly specialized in R&D and production of various functional components, and ranks in the forefront in terms of quality and performance in the world. Japan focuses on the development of CNC systems, and machine tool companies herein keep an eye on the layout of upstream materials and components as well as integrated development of core products. The United States has strong competitiveness in the design, manufacturing and basic scientific research of CNC machine tools. China's machine tool industry started late, but it develops rapidly, with significant growth in technology and market size. Now China has become the world's largest machine tool producer, marketer and consumer, with high sensitivity to the market as well as fast response to sale and services.

As China's high-end manufacturing represented by automotive, aerospace, shipbuilding, electric equipment, construction machinery and 3C industries require higher and higher performance and accuracy of CNC machine tools, the market demand for CNC machine tools in China, especially high-end CNC machine tools, has been increasing. Therefore, the market size is expected to expand steadily.

With the continuous deepening of the structural adjustment of China's machine tool industry, the CNC level of machine tools has jumped significantly, but still heavily lagging behind developed industrialized countries; especially, China only sees 6% in the localization rate of high-end CNC machine tools which are mainly imported. This means a huge opportunity for domestic substitution in the future.

By region, Chinese CNC machine tools are dominated by **East China** where the market size of CNC machine tools reaches RMB180.5 billion with the share of 55% nationwide in 2019. The second-ranked Central South China secured the market size of RMB62.46 billion, accounting for 19% of the national CNC machine tool market. The market size of Northeast China, North China, Southwest China and Northwest China hits RMB38.92 billion, RMB 23.54 billion, RMB 17 billion and RMB4.58 billion respectively, accounting for 12%, 7%, 5% and 2% of the national CNC machine tool market separately.

Globally, Japan-based Mazak ranks first in the CNC machine tool industry with US\$5.28 billion, followed by Germany-based TRUMPF and DMG Mori Seiki (a German-Japanese joint venture) with US\$4.24 billion and US\$3.82 billion respectively. Other players include MAG, Amada, Okuma, Makino, GROB, Haas, and EMAG.

**MAZAK**, a world-renowned manufacturer of machine tools, has always secured the overwhelming market share. Founded in 1919, the company mainly produces CNC lathes, composite turning and milling machining centers, vertical machining centers, horizontal machining centers, CNC laser systems, FMS flexible production systems, CAD/CAM systems, CNC devices, and production support software. The products are famous in the industry for their high speed and high precision, and available in all sectors of the machinery industry. MAZAK's production bases in China include Ningxia Little Giant Machine Tool Co., Ltd. and the Dalian plant in Liaoning.

As one of the leading companies in the global manufacturing technology field, **TRUMPF** has invested in China since 2000. It has invested in four companies in Taicang (Jiangsu) and Dongguan (Guangdong), producing CNC sheet metal processing machine tools and medical equipment. TRUMPF plans to gradually develop, produce and sell various CNC machine tools under the TRUMPF brand in China.

**DMG Mori Seiki**, a joint venture between DMG and Mori Seiki, is an important equipment manufacturer in high-end manufacturing. The vertical machine tools, horizontal machine tools, three-axis machine tools, four-axis machine tools, five-axis machine tools, composite turning & milling machining centers, ultrasonic/laser machining centers, produced by DMG Mori Seiki represent the development direction and the highest technological level of the machine tool industry at home and abroad.

In China, main CNC machine tool players include Shenyang Machine Tool, Haitian Precision Machinery, Guosheng Intelligence Technology and RIFA Precision Machinery. Among them, Shenyang Machine Tool mainly offers CNC lathes, small five-axis vertical machining centers, drilling and tapping centers, vertical machining centers, and horizontal machining centers; in 2019, the revenue of its machine tools and accessories was RMB1,002 million, of which CNC machine tools accounted for 37.07%. Haitian Precision Machinery's main products include CNC gantry machining centers, CNC horizontal machining centers, CNC vertical machining centers, and other machine tools; in 2019, it earned the revenue of RMB1,123 million from machine tools, of which CNC gantry machining centers made up 64.53%. Guosheng Intelligence Technology mainly produces CNC machine tools, intelligent automated production lines, equipment components, etc.; in 2019, it gained RMB657 million, of which 62.99% came from CNC machine tools and 14.62% from intelligent automated production lines. RIFA Precision Machinery primarily provides digital intelligent machine tools and production lines, aerospace intelligent equipment and production lines, and aerospace parts processing, engineering, operation, lease and sale of fixed wings, as well as engineering, operation, lease and sale of helicopters, etc.; in 2019, it achieved RMB2,160 million, of which 28.72% stemmed from digital intelligent machine tools and production lines.

Global and China CNC Machine Tool Industry Report, 2020-2026 by ResearchInChina mainly deals with the following:

- ◆ Definition and classification of CNC machine tools, including industrial chain, etc.;
- ◆ Scale, demand structure, competitive landscape, etc. of global and Chinese machine tool markets;
- ◆ The global CNC machine tool market size, the structure of market segments, as well as the development in Japan, Germany, South Korea, etc.;
- ◆ Scale, product structure, demand structure, import & export, competitive landscape and development trend of Chinese CNC machine tool market;
- ◆ Output, sales volume, import & export, and competitive landscape of major CNC machine tool market segments such as CNC lathes, CNC grinders, and machining centers;
- ◆ Overview of the upstream and downstream markets of the CNC machine tool industry;
- ◆ Operation and CNC machine tool business of 12 foreign and 13 Chinese CNC machine tool manufacturers.

Xiaopeng Motors' XPILOT 3.0 boasts navigation guided pilot (NGP) and a Memory Parking functionality for parking lots. The NGP highway solution enables traffic cone recognition and avoidance, super follow-up on congested roads, night overtaking reminder, faulty vehicle avoidance, large truck avoidance, automatic speed limit adjustment, optimal lane selection, automatic on/off-ramp, and automatic overtaking, and works on highways, expressways, and some urban trunk roads. The automaker plans release of mass-produced intelligent vehicles equipped with Lidar and L3 autonomous driving function in 2021, L4 autonomous driving technologies in 2023 and implementation of XPILOT 5.0 in 2025 to realize L5 full automation.

Weltmeister and Baidu partner more closely. Their L3 driving assistance functions are expected to be rolled out and mounted on mass-produced cars in 2021.

Leading Ideal plans to deliver navigate on autopilot (NOA) capability between 2021 and 2022, and introduce X01, a model with standard configurations of L4 hardware and single NVIDIA Orin SoC that affords 200TOPS computing force (upgraded to dual SoC, 400TOPS) and 45W power consumption.

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